

## Virtual Communities Project (VCP) Frequently Asked Questions

*Last Updated: 7 July 2008*

### VCP Background and General Information on Virtual Communities

#### **Q. What are the Driving Forces behind the Virtual Communities Project (VCP)?**

- A.** There are three driving forces behind the VCP aimed at delivering value and solutions for members' wants and needs:
- 1) To enable an environment where members can freely exchange and contribute project management knowledge without facing barriers to participation because of where they live and what they do;
  - 2) To provide and create the capability for members to network with others involved in a particular field to solve issues, and build and advance their careers;
  - 3) To deliver at a minimum a baseline of member value upon entering the PMI portal for knowledge and interaction.

#### **Additional Background:**

These driving forces were born out of PMI's strategic plan and evidenced through member satisfaction surveys, market research and an assessment of existing capabilities and delivery methods. As early as 2002, satisfaction surveys of members indicated that access to technical information and networking were among the leading needs of the members of PMI. Given that PMI's strategic plan and alignment methodologies were still in development in 2002, the first step taken was around community development transformation. Today, access to knowledge remains the top reason why members renew PMI.

The virtual community model that PMI is now using in the form of SIGs and Colleges was established over ten years ago to meet the need of industry-specific networking and knowledge sharing within a fairly small project management community (at that time, there were approximately 12,000 PMI members). During the period of time between the chartering of the first SIG community in 1994 and 2008, the emergence of the internet and industry dynamics shifted the way these communities interacted and delivered value to their members. A paper and post-mail based system shifted to an online environment, including free search capabilities and other virtual networking services, that continued to mature and advance faster than the PMI environment was able to provide. Fledgling social networks, on-line encyclopedias, and new "wiki"-type tools were taking shape. It was evident that unless PMI changed to adopt a flexible system of engagement and service delivery, it would soon face declining value to members and others in the project management profession. This led the PMI board and staff to take action, particularly in creating new geographic and virtual community models, and in the creation of a knowledge strategy that would align itself to the strategies of PMI to better serve its members.

**Q. How did the Community Transformation Project (CTP) evolve and lead to the Virtual Communities Project (VCP)?**

- A.** In December of 2004, an approach to rebuilding communities through a project called the Community Transformation Project (CTP) was proposed to and approved by the PMI Board of Directors. The board commissioned a team to study PMI communities and determine how to reshape them to meet the expressed needs of the membership. It was at that moment in time that the board decided that there was a great opportunity to change its community models for geographic and virtual communities, and help PMI increase its outreach to members. At the same time, it was concluded that if PMI did not change its legacy models, member needs as indicated through market research would not be met, and they would go to other outlets and sources to access it.

By early 2005, both the PMI Strategic Plan and the Balanced Scorecard Strategy Map were in place. At that point, the first clear knowledge strategy was envisioned, and later developed fully, that not only drove changes in PMI knowledge development, but recognized SIGs and Colleges as integral to the strategy.

To address the changes that needed to take place, 18 PMI members from 15 countries, representing chapters, colleges and SIGs were assembled as a project team for CTP, and began the process of studying community formation in PMI. At that time, the leaders of PMI's communities, representatives of PMI's Board, and several PMI staff met to identify ways that communities can better support the growth of the project management profession and PMI.

The CTP team realized in July 2006 that if it were to progress with testing and implementing any models of virtual communities, that it would require more SIG and College participation. Therefore, upon the team's recommendation, PMI decided to remove the work on SIGs, Colleges and virtual communities from the scope of the project. The CTP team then worked directly on the new model for chapters for the remainder of the year, and completed their work in December of 2006.

In January 2007, the Virtual Communities Project (VCP) was launched and a project team commissioned to address the driving forces leading to VCP. The VCP Team completed its Phase I deliverables in December 2007, and a new advisory group was created to manage the introduction of the new models in 2008. Testing of the new models is underway in 2008, with full launch schedule planned to begin in the first quarter of 2009.

**Q. What are the key deliverables that are currently being addressed by VCP?**

Phase 2 of VCP, which is currently in progress for the year 2008, is addressing these key deliverables:

- Finalization of Phase 1 (2007) Deliverable Package, including:
  - Development of community model names
  - Community governance and structure
  - Community leadership roles and selection
  - Transition and Dissolution process for existing SIGs and Colleges
  - Formation process for new virtual communities
  - Ongoing budgeting and resource allocation from PMI
  - Final technology platform selected (primarily web) – SharePoint 2007

- Implementation/Testing of community websites to pilot the new models
- Integration of virtual community leadership role within the Leadership Institute Program.

### **Additional Background:**

Phase 1 of VCP, which ran from March through December 2007, accomplished these key deliverables:

- Survey member needs and/or values
- Develop new models
- Update Performance Management Framework (as needed)
- Develop implementation plan for newly forming communities
- Develop transition plan for existing SIGs/colleges
- Respond to any backlog requests following closure of the project phase

These deliverables were accomplished through several face-to-face meetings as well as weekly status meetings for all participants.

## **Q. Who is leading the VCP – Phase 2?**

- A.** VCP Phase 2 is addressed by a cross-functional team comprised of both volunteer leaders in the form of the Virtual Communities Advisory Group (VCAG) and PMI staff.

The members of the VCAG serve on this advisory group to ensure representation of the SIGs and Colleges. The VCAG is comprised of

Rose Mary Tyler, PMP,  
Guillaume Saouli, PMP,  
David Violette, PMP, and  
Dan Tuten, PMP

Additionally, the current SIG/College Mentors: Joanne Gumaer, PMP and Kent Hamblen, PMP serve on this advisory group to ensure linkage to and representation of the SIGs and Colleges.

Staff resources include representatives from PMI's Component and Community Relations (C&CR), Information Technology, Legal, Marketing, Project Management, Customer Care, Finance and Knowledge Delivery departments. Additional departmental resources are brought in on an as-needed basis depending on the requirements of the project.

### **Additional Background:**

During VCP Phase 1, each current SIG and college was asked to nominate a representative to the VCP team based on their SIG or college leadership experience and other specified criteria. The boards of each SIG and college selected a total of 29 representatives to participate in Phase I of the project. The project team was globally

diverse and included representatives from PMI staff. PMI Board of Directors member Karen G. Tate, MBA, PMP participated actively as Board liaison to the project team.

A subsequent application evaluation process was conducted to establish **core and review teams** as part of the overall project team. The VCP team was then divided into two elements: the **review team** provided feedback and input from the perspective of their SIG or college; the **core team** had a greater time commitment and more extensive responsibilities.

The project team charter expired on 31 Dec 2007 and the work that had been completed by the project team was transitioned to a new project team in order to be implemented during the second phase of the project (VCP Phase 2).

The new project charter for VCP Phase 2 was approved by PMI Executive Vice President and COO, VCP Project Sponsor Mark Langley on 13 February 2008.

The Virtual Communities Advisory Group (VCAG), which was chartered in January 2008, was created with the purpose of serving as a critical linkage between the staff organization and the SIG/College community and providing feedback and advice to PMI's C&CR department for enhancement and refinement of virtual community transition, formation and maintenance policies and procedures. Three members of the VCP Core Team transitioned onto the VCAG.

## **Q. What kind of benchmarking did PMI perform in initiating this project and organizational change?**

- A.** PMI and the project teams researched and interacted with various organizations, including other nonprofit associations, corporations and government agencies. Publications including books, web sites, magazines, handbooks and formation guides were reviewed, with some content borrowed by PMI for new virtual community formation. Many sources pointed back to Etienne Wenger's *Communities of Practice* publication and line of work in creating communities of practitioners with common interests, and their alignment to knowledge management and organizational development concepts. In the process of researching *how* communities work within organizations, PMI also found that some organizations realized the formation of *hundreds* of communities. The potential for quick forming, problem solving communities within PMI could be boundless. Through the efforts and experiences of other organizations, PMI is prepared with experience, effort and resources to launch a new model of community access and participation.

### **Additional Background:**

The first time PMI studied "community modeling" was in January of 2003, when a special conference was commissioned, involving board and staff, to listen to subject matter experts (SME) from organizations and associations speak of their experience in evolving models of communities. That followed with a series of mini white papers for review by the PMI Governance committee. In the fall of 2003, the board agreed to study what we should do to evolve our communities. The board asked that we include discussions with component leaders throughout the world.

Another internal conference was held in 2004 to bring together CEOs of other associations to show how virtual memberships and communities were being formed at other

organizations. At the North American Leadership Institute Meeting, a community thought leader facilitated a discussion with all component leaders to determine needs of their members and constituents when it came to component services. The CTP was then proposed to and approved by the board.

**Q. Where can I find out more about the VCP activities?**

- A.** Regular updates about VCP are provided through the component leadership **community** website. Updates are posted for community leaders in Friday Facts twice a month and at every Leadership Institute Meeting which precedes the PMI Global Congresses. Information is also provided to community leaders in the monthly SIG/College Leadership conference calls. Articles for the general membership are featured in PMI publications, such as PMI Today.

PMI's executive staff, including President and CEO Greg Balestrero and EVP and COO Mark Langley, have availed themselves to every SIG and College board to gather and discuss the VCP initiative and changes to the organization. Some SIGs and colleges have brought their boards together for this purpose and others have arranged time at their conferences or PMI events to participate in these gatherings.

## **Governance, Incorporation and Infrastructure**

**Q. How does “Normalization of Value” relate to VCP?**

- A.** The generally accepted definition for “normalization” is “cause to conform to a standard or norm”. Within the context of the Virtual Communities Project, the process of normalizing community value is meant that no matter which community to which a member belongs, he will be able to easily access it and receive at least a minimum set level of quality and service provided to him. Called “core services,” they represent a benchmark by which all community member services will be minimally set and measured annually. To accomplish this end, the Virtual Communities Project team created a performance management framework (PMF) that establishes the minimally acceptable standards (core services) that are offered by a community.

While often misused interchangeably, normalization is not the same as equalization (e.g. to make equal). A goal of the project is to promote consistently high standards across all of the communities (normalize value), not create a "one size fits all" community model or to establish a limitation that would prevent communities from delivering services above the minimally required level.

**Q. How will current leaders be impacted by the transition to the new virtual community model(s) that result from VCP?**

- A.** Existing leaders remain essential to the successful transition and implementation to the new community models and their future success. In the new model(s), a leadership team called the “Community Council” comprised of active volunteers and participating subject matter experts will drive the new communities’ alignment to the PMI Strategic Plan and deliver the core services for the community type. The expectation is that all interested and current SIG/College Leaders will lead the community in the transition process, and serve as the first Community Council within that community.

### **Additional Background:**

Each community that forms will create a business case for the need and formation of the community. The proposed community will identify roles needed to create, sustain and motivate the community participants, along with the qualifications and skills needed to fill those roles, which align to the services to be delivered by the community. These roles will likely vary by community, but will focus their efforts and attention on delivering value to the community participants through the contribution and sharing of knowledge.

Since one of the goals of the new virtual communities is to minimize administration, PMI will work with its communities to share and leverage systems and processes. For example, PMI's volunteer recruitment system will be extended for use in the virtual communities structure. The Community Council will identify and inform PMI of the skills and qualifications of the roles needed within the community. PMI systems will be utilized to recruit and confirm the membership of those individuals applying for community roles. The members of the community will select those individuals they deem best to manage the community's growth and sustainability. Transition planning and enabling participant involvement will be critical in the effectiveness of these roles.

### **Q. In the future, how will PMI virtual communities be administered?**

- A.** The VCP team developed an implementation plan, which includes a formation process for newly forming communities and a transition plan for existing communities. These processes identify all of the tasks and deliverables as well as qualities of the leadership involved in forming and maintaining the community. A three-year business plan will be required as part of the formation process of each community. Templates for the deliverables will be provided for guidance.

### **Q. What are the core services to be delivered by the new community models?**

- A.** Members of PMI virtual communities will benefit from access to knowledge from experts in a variety of industries and subject areas to solve immediate issues in managing their projects as well as to advance their career in the profession. Communities will spread the superior practice and advancement of project management by sharing experience and knowledge. Members will benefit from a consistent set of valued services delivered by all virtual communities in the form of core services. They vary depending upon the community type, with services ranging from online collaboration, discussion topics, and knowledge sharing through a website, to events, member recognition and leadership opportunities, inter-member communication, and community meetings.

### **Q. Have names for the new community models been established? What are they?**

- A.** New names have been chosen for the two models, replacing the temporary names assigned in Phase 1 of the project. The new community names are:

#### **Community of Practice** (formerly referred to as Model 2)

*Communities of Practice* are groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their understanding and knowledge of this area by interacting on an ongoing basis. All communities of practice share a general structure

that consists of three basic elements including a domain of knowledge that defines a set of issues, a community of people who care about and are connected in some way to the domain, and the shared practice that is being developed to be effective in the domain.

### Forum (formerly referred to as Model 3)

A forum is inherently open, with access and freedom to move around and learn and engage as desired; the true value of this community type lies in providing proximity to others with the same needs/skills/perspectives. It is fluid, and valuable for its ability to adapt as the needs and expectations of the members change.

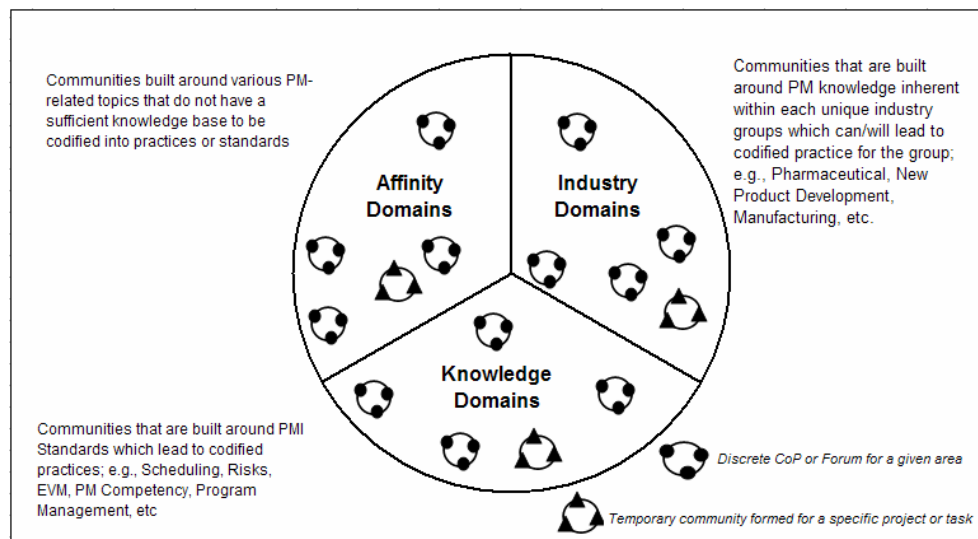
The etymology of forum is Latin, akin to foris (outside), fores (door). "Place of assembly in ancient Rome," from L. forum "marketplace" apparently akin to foris, foras "out of doors, outside." Sense of "assembly, place for public discussion" first recorded in 1690. The core services of this free model, open to all PMI members and registered guests include all of the fundamental elements of a community, while still extending (and expecting) joint participation.

### Q. How will scope of a community be determined?

The scope of a virtual community focus is envisioned to be focused on distinct domains:

- Knowledge Domains, consistent with the knowledge areas of the *PMBOK*® Guide or other PMI Standards;
- Industry Domains, communities centered around the various industry bases such as ICT, pharmaceutical, etc.
- Affinity Communities, communities centered around topical areas of interest such as Women in Project Management. The figure below illustrates the envisioned alignment of the different virtual communities. (Please see figure).

In addition, PMI has looked at various classification systems to best match PMI's member profile. While no perfect system exists for PMI's purposes, PMI will select one that is globally representative and tailor it for the membership base. Virtual communities will be mapped to this tailored system.



**Q. Will there be one committee governing all virtual communities? Or one committee per community?**

- A.** One committee will govern each virtual community. The governance of the virtual communities will be driven by the purpose, alignment and scope of the communities. Within these virtual communities, a leadership team, known as a Community Council, will serve the tactical and operational needs of the community and be responsible for the implementation and actualization of the business plan objectives.

In addition, an advisory group will serve PMI as advisors to the community formation and alignment processes. The Virtual Community Advisory Group (VCAG) will also serve as liaisons and mentors to all of the virtual communities in a strategic and advisory capacity.

**Q. Does the new model funding come from member dues?**

- A.** The new virtual community models will be supported by PMI's program plan and budget. A "single pricing model" is under development that will identify the membership and financial processes that enable members to access PMI's virtual communities. Any dues collected from these memberships would then support the line item budgets of the virtual communities. This model is expected to be delivered in 2008 with development taking place in 2009 for a 2010 implementation.

## Community Models Transition

**Q. Will the existing SIGs and Colleges be permitted to maintain their model as a separately incorporated organization? Will there be any exceptions?**

- A.** No. Separately incorporated virtual organizations (the existing SIG/College model) will not be perpetuated. The existing organizations will develop their business cases to transition to one of the new virtual community models.

**Additional Background:**

Several key elements continue to develop around governance, roles, and a membership and financial model which may impact the transition process. At this time, PMI volunteer and staff resources are focused on the successful pilot of the new models as well as the implementation plan for new communities.

Although an "exception process" was discussed in the event that the VCP team participants and other leadership overlooked something in the design of the new models, an exception process has not been designed nor will any specific work be performed for an exception process in the near future. Any prior reference to an exception process was meant to allow the possibility that unforeseen circumstances or lessons learned could impact or influence an existing model or suggest the need for an additional model type. It was not intended to suggest the possibility that any existing SIG or College could avoid a transition to one of the new virtual community models.



**Q. Should SIGs and Colleges continue to follow their governing documents and processes as usual?**

**A.** It is advised that the SIGs/Colleges should continue their operations status quo until full details of the transition plan are announced in July 2008, including commitment to begin the transition. While PMI may be willing to make procedural exceptions, as separately incorporated entities, these organizations do not have the option to waive their fiduciary obligations. It will be helpful to the transitioning community to maintain a consistent leadership during the transition period with proper record keeping and protocols. Please contact PMI Component & Community Relations Dept for further guidance.

**Q. Volunteers derive value from the experience of running a virtual business unit. How does the new virtual community model create this experience for volunteers?**

**A.** As previously stated, one of the priorities of the Virtual Communities Project is to shift the focus of the current leadership structure from administrative leadership to thought leadership, knowledge stewardship, and member value creation. The roles serving the communities are suggested, and it is the purview of each community to define the scope and amount of roles needed to serve the membership needs.

However, many of the core tasks and responsibilities currently associated with the successful operation and member value creation by the SIGs and Colleges as they exist today will not go away when the new virtual community models are implemented. In fact, the implementation of the virtual community business plan and performance management framework associated with the new community models will require a greater level of responsibility and accountability to successfully lead the new communities.

What will change is the quantity of these activities and the number of resources that will be required to do them. Under the new structure each community will have a leadership team (named the Community Council) that could be similar in composition and structure to the SIG/College boards. Roles and titles will also change to eliminate any assumption of separate organizations, but there will be ample opportunity for individuals representing a variety of skill sets to make tangible and valuable contributions to the communities in which they choose to participate.

## **Member Value**

**Q. If many of the SIGs are doing a good job of delivering member value, why change?**

**A.** Some of PMI's SIGs have delivered member value through collaboration and knowledge delivery. Examples include newsletter translations, webinars, and technology improvements including enhanced security. Most efforts are delivered through a volunteer effort and sometimes a limited budget. Volunteer leaders have cited shortages in leadership tenure, planning and execution, often leading to an inconsistency in the type and frequency of services delivered by each community. A result of VCP will be the connection of all the communities to enable knowledge sharing across community lines.

Current trends suggest that competition for members' attention, time and money, and an expanding presence of member participation from outside of North America, make it imperative that PMI create a centralized "warehouse of knowledge" that is accessible and contributed to by members and leaders of PMI. It is assumed that the "warehouse" will be filled with content to cover all desired focus areas to meet the immediate needs of members anytime, anywhere. To do so, PMI must fully enable this centralized "warehouse" or center with defined processes for entering and obtaining knowledge to make it easier, faster and more recognizable for members to come to and trust PMI as the 'go-to' place for project management knowledge. The vision is that the new virtual communities and their content leaders will be responsible for "populating an appropriate section of the warehouse" as the subject matter experts in a given field.

#### **Additional Background:**

For several years, it seemed the PMI SIGs and Colleges were aptly addressing members' needs for knowledge and networking. However, after careful scrutiny of the member statistics such as PMI membership turnover for both PMI and for the SIGs and Colleges, it became evident that the SIGs and Colleges were not providing significant technical information, particularly to members at large; nor was PMI providing a continuing slate of technical information independent of existing SIGs and Colleges. Low membership figures for SIGs and Colleges, and the low member retention rates of both PMI and the SIGs and Colleges, reflected a need to evaluate the present SIG and College models, and address the organization's ability to deliver member value.

- Q. Credibility is a major factor in finding information useful and helpful. Will volunteer roles such as content leaders or subject matter experts be developed to monitor the credibility of the information being disseminated?**
- A.** Individuals seeking knowledge expect to find quality information quickly and easily. Credible knowledge will be made accessible via [www.pmi.org](http://www.pmi.org) through its knowledge portal and communities. The volunteer leaders and subject matter experts within the communities accept the role to create and capture quality content. These contributors within the profession define value and meet the needs of members through roles such as subject matter experts, mentors, content creators and editors, moderators and administrators. These roles will assume the responsibility to uphold the PMI Code of Ethics and Professional Conduct. Contributors and moderators alike are also staking their professional reputation through the information they contribute, so they should self-monitor the credibility of the information.
- Q. Will PMI's chapters be involved or integrated into the benefits of PMI virtual communities? After all, some are creating their own virtual communities today.**
- A.** Knowledge is requested for, and comes from, a variety of focus areas, including industry-specific and geography-specific. PMI will position its members for success with industry-specific and geographic-specific knowledge within its communities and knowledge base. Future releases of PMI's virtual communities will consider geographic community knowledge sharing and collaboration.

More than ever, PMI's chapter leaders are entering the realm of virtual community leadership. In 2006, the Community Transformation Project (CTP) delivered a chapter model called Chapter with Branches. This model sets up equivocal value delivered within

defined boundaries through multiple geographical centers. The Component Mentor Program\* is another great example of virtual community leadership focused within geographical boundaries.

*\*Component mentors serve as advisors and information resources helping PMI component leaders and staff to build leadership skills. Mentors work as liaisons between component leaders and PMI, helping to facilitate collaboration, encourage networking and foster two-way communication. Component mentors serve for three years and have the option of serving a fourth year.*

**Q. What will result in the new structure that will convince members to renew and stay with PMI? Why is this better?**

**A.** PMI members will have the ability to access PMI's portal as a single entry point to search and contribute to the knowledge base. Entry will be granted based upon recognition of their status. They will have quick access to one knowledge base that will deliver solutions to their immediate problems, provide for their knowledge needs across a variety of knowledge and subject matter areas, and link them to other members like themselves when additional dialogue or connection is desired by the member. Practical knowledge – something the member can apply now – is the type of knowledge most needed by members, which will be provided in this new solution.

## Technology

**Q. How will PMI support the technology of the virtual communities in the new models?**

**A.** The VCP information technology team is implementing/testing the technology solution for the community sites. Other tools and technology that are required to operate a Virtual Community are also being reviewed relative to core services, as defined by the PMF, such as web conferencing and teleconferencing.

These websites will be tightly integrated into PMI's overall enterprise architecture creating the perception for all participants that they are part of "one PMI".

**Q. It has been reported that the VCP team is gathering tech requirements, and that new technology is rolling out. How can you be confident of a fourth quarter (Q4) 2008 rollout?**

**A.** Given the importance of this effort, PMI has performed extensive requirements and technical analyses on several platforms for the past four months to help select an optimal solution for the Virtual Communities. This analysis included assessments of scalability and integration with the PMI Enterprise Architecture, as well as proof of concepts through prototyping from different potential solutions. Having completed the platform/solution evaluations, SharePoint 2007 was selected for VCP, and we are now in the Construction Phase of the software development process. According to the plan in place, the Q4 timeframe is very feasible.

While PMI is confident of a Q4 roll-out, the only thing constant is change. This is especially true with technology. PMI will continue to communicate with all stakeholders on the progress.

**Q. What features will be included in the pilot of the models and how will future features be released?**

- A.** At a high level, the following features will be included in the pilot version of the Virtual Communities:
- **Collaboration** (shared documents, discussion groups, announcements, surveys, calendars, and links),
  - **Administrative functionality** (content management and workflow, FAQs, community knowledge delivery, and online help),
  - **Automatic Notifications**
  - **Webinars and Teleconferencing,**
  - **Robust Searching Capabilities**
  - **Secure Access**

**Background:**

The Information Technology Department has worked closely with the PMI Component & Community Relations Department in an effort to gather the requirements/needs for the virtual communities' sites. Through documentation, feedback, and interactions with the Virtual Community Advisory Group, SIG/College Leaders, SIG/College Mentors, and Volunteers, 349 requirements were specified for the full scope of the Virtual Communities Pilots.

Additional features were identified for post pilot implementation of the Virtual Community Pilots and subsequent releases of the Virtual Communities Project. PMI, along with the Component and Community Relations Department, Virtual Community Advisory Group, SIG/College Leaders, and SIG/College Mentors have strategically prioritized each of these features. Once implemented, these new features will provide even greater enhancements to the sites, which will advance our continued effort to provide superior customer experience, satisfaction and value to our members. PMI will continue to research new technology and best practices in order to better serve our members and community at large.